

Report of the Education Task Force

Considering the Current and Future Role of STC in its Mission to Educate its Members

Submitted to The Board of Directors
Society for Technical Communication

Task Force members:

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How the Task Force Was Formed

In January 2006, Suzanna Laurent, President, asked Carol Barnum to create a task force on education and to report recommendations for action to the board at its May meeting. The charge to the Task Force was to consider STC's mission in support of education of its members and to recommend ways in which STC should reposition itself as part of the transformation.

The process was to kick off with a workshop at the January board meeting in Atlanta and to conclude with the recommendation report.

The recommendation report is to be used for three purposes:

- Action by the board at its May 2006 meeting
- Information and direction for the new Education Director in the Society office, a position that was approved by the board at its January meeting
- Information and direction for the new Executive Director in the Society office and for use by the incoming STC president and the 1st vice president (providing transition and continuity for any actions taken for the next several years)

The Task Force included the following members:

Carol Barnum, Chair
Saul Carliner
David Dayton
Lynn Harris
George Hayhoe
Bill Horton
Kathryn Northcut
Makarand Pandit
Ginny Redish
Alison Reynolds

The Task Force included senior and junior STC members, with representation from two regions outside North America.

How the Task Force Worked

Over the two-and-a-half months in which we have worked, we have met three times by conference call of the whole. The first meeting was organizational, in which we reviewed the charge. The second meeting focused on conferences, during which various members of the task force reported on investigations of other conferences, with a special focus on the ways in which they provide education/certificates for members and attendees. Five relevant organizations were identified:

- IEEE (including PCS, the Professional Communication Society)
- AMWA (American Medical Writers Association)
- UPA (Usability Professionals' Association)
- ASTD (American Society for Training and Development)
- VNU Business Media (a private organization)

Following a discussion of these other models, we agreed to continue as two subcommittees to explore the following overlapping but separate directions:
 Annual conference—Saul Carliner, chair
 Electronic delivery—George Hayhoe, chair

Each of these subcommittees communicated issues and discussion via email, sending summaries and recommendations to the Task Force. The Task Force then met on March 30, 2006, for its third and final conference call to merge the recommendations of the two subcommittees and to expand on the discussion. The results of these discussions, which achieved unanimous agreement from the Task Force, are outlined in this report.

Background Information that the Task Force Used

Several reports were generated and led up to the formation of the STC Education Task Force, including the following:

- Saul Carliner's January 2005 proposal for revisions to the STC Education Program, prepared at the request of then First-Vice-president Suzanna Laurent and submitted to the previous Executive Director for consideration.
- Interim Director Rob Moran's report (November 22, 2005) to the AP for Education and the STC president on "The Future of STC's Educational Programs."
- Ginny Redish's response to the report (December 20, 2005), requested by Suzanna Laurent, for discussion purposes.
- A survey of members regarding their views on education and STC's participation in education efforts (survey posted before the January 2006 board meeting; summary made available to board and task force)
- The half-day workshop on education, planned for the January board meeting (before this committee was constituted)
- The strategic plan, as updated by Jamie Conklin and his committee (January 2006)

Based on these data, Barnum gave the following charge to the Task Force:

- What is STC currently doing well with regard to its mission to educate its members?
- What is STC not currently doing as well as it should?
- What should STC be doing that it is not currently doing at all?
- What should STC do immediately (in the next year) to change its direction?
- What should STC be planning for the next several years to address its mission of education?

Timing of this Report

Because STC is currently searching for a new Executive Director, as well as filling the new position of Education Director, this report is timed to address the transition and transformation in the Society Office. Although we had a very short timeframe in which to do this work, the Task Force worked diligently, with a keen sense of urgency and commitment. We are extremely enthusiastic about the exciting new directions proposed in this report, not only for their ability to take STC forward, using tools and technology that are currently available but not necessarily fully employed, but also because these recommendations are needed, and many would say past due.

We are greatly encouraged by the commitment of the board leadership in supporting and fostering the exploration of this subject and in their desire for the recommendations.

Overview of Findings

Specific recommendations are divided into two sections:

- Conference(s)—the annual Spring conference and a proposed Fall conference
 - We recommend a number of changes to the annual conference to address the high turnover rate in conference attendance, the lack of significant focus for advanced professionals, and the general lack of marketing of the conference outside of STC.
 - We recommend a much stronger education focus for the conference to the extent that the conference should become the primary source of education and training for STC members for the year.
 - We recommend an additional Fall conference, offering more strategic topics based on needs and interests of members.

- Because certificates would add value for participants and generate revenue for the Society, we recommend that STC immediately begin offering certificates of conference or pre-conference attendance. Further, we recommend offering certificates of accomplishment, with requirements surpassing attendance, addressing strategic topics such as tools or specific knowledge areas.
- Electronic delivery--using the STC website as a portal to all educational opportunities/information
 - The website is currently designed to correspond to the organizational structure of STC; we envision a new approach to the website as a destination portal, at which technical communicators can search on topics and locate resources across the knowledge base currently available in “silos” representing individual SIGs, individual publications, newsletters, blogs, and conferences (annual and regional).
 - The tools and technology in support of database access, podcasts, blogs, and other electronic delivery mechanisms for the dissemination of and access to information may require more staff than can currently support all the recommendations in this report; but we urge that the first steps be taken to measure the effect.

STC needs to be able to generate revenue to support any of these activities. All the recommendations in our report have this goal in mind; however, it may not be possible to break even or make money from the new type of conference in the next year, as it will take time and marketing to explain the changes and attract an audience we may have lost or never had, while still keeping the loyal base we do have.

Fundamentally, the recommendations in this report are aimed at supporting all our communities, both geographic and virtual, as well as engaging those who have not looked to or known about STC as an education resource.

Conference Recommendation: Change in Philosophy for STC Annual Conference

As it is currently designed, the “value proposition” for STC annual conference participants is extremely limited. Ours is a conference whose program is designed under the philosophy that of greatest value is the opportunity for members to share their experience and knowledge with others. In practical terms, this means that our acceptance rates can approach 100 percent, with speakers constituting a significant percentage of attendees. However, proposal topics are necessarily limited by the expertise and interests of the presenters.

Most people attending the conference want it to be their primary source of education and training for the year. Unfortunately, because many of the topics that participants want to learn about are not proposed by potential speakers, and because we do not compensate speakers except for the keynote, we are not able to provide a conference program that delivers real value to experienced members as well as to newcomers. Furthermore, the large number of concurrent sessions—sometimes justified to increase the number of speaking opportunities—is overwhelming to participants. In many instances, the same topic is covered by 4 or 5 speakers, while other key topics are not covered because the Program Committee did not receive a proposal and does not have the resources to invite and compensate a qualified presenter.

More significantly, this has resulted in attendance that is disappointing and many senior members—historically, the most loyal base of members and conference participants—expressing concern that the event does not hold anything of value to them. Many have chosen to attend other events.

To move forward, the conference needs to choose one of these two philosophies—favoring participation and attendance or favoring depth and breadth of topics—and align our program policies, design, selection, and marketing with it.

The consensus of the task force is that the guiding philosophy of the STC Annual Conference should be that the event is the primary source of education and training.

Note that this does not mean we should not solicit presentations from members. Indeed, we will still rely on their generosity as speakers, and the majority of the sessions will be members sharing their expertise. But we need to be able to invite speakers who would not otherwise attend the STC Annual Conference and who have compelling material that would be marketable to potential participants.

Specific Recommendations

Unless noted otherwise, these recommendations pertain to the STC Annual Conference.

1. The underlying philosophy guiding the design of the conference program is that it is the primary source of education and training for our members. Sessions should be selected first on their value to members, rather than to generate a registration by a speaker. Put more simply, our members want “hot content” (varying from year to year) at an attractive price.

2. The conference needs to attract senior managers responsible for technical communication, and senior practitioners, who have been drifting to other events. To reverse this trend, we recommend:

- Appointing a senior advisory committee for the conference program, to advise the program committee. The requirement is that the members should be senior managers of large technical communication groups (for example, someone who manages a group with 20 or more technical communicators reporting to them), senior academics (for example, one who has a well-established reputation in the field), and senior practitioners (for example, ones who have published at least 2 books with a major press, or some similar accomplishment), and who are well-known in the field.
- Offering conferences-within-a-conference that appeal to interest groups within the organization.

3. Allow for compensation of speakers who have technical and educational content of interest to our membership and who will be a draw (thus justifying any payment). The Conference Advisory Committee for the 2007 conference would formulate a policy permitting the program committees to recruit up to an assigned percentage of speakers (perhaps 30 percent) through invitation and to offer these speakers complimentary registrations, travel expenses, and, when needed, payment for their presentations.

4. Move post-conference workshops to pre-conference positions. This seems to be the industry standard, and a number of committee members mentioned that by the end of the conference most people are too drained to receive the full value of a workshop.

5. Offer certificate programs. Two types of certificates could be made available. The certificate of attendance would reward attendance at a combination of pre-conference workshop and designated conference sessions. A certificate of performance, offered separately or in conjunction with a certificate of attendance, would acknowledge acceptable performance and participation at a combination of pre-conference workshops and designated conference sessions, plus appropriate course work.

Presenters for these certificate-qualifying sessions should be compensated at or near prevailing industry rates. In addition, instructors should be compensated for grading assignments. As a result, there would likely be separate pricing for the two types of certificates.

Note that the certificate programs could also be offered at other times of the year, but

could be priced attractively to include conference registration and, when scheduled with the conference, might also require attendance at certain conference sessions.

To provide an ongoing source of revenue to the Society, some of these certificates should be on perennial topics, like a certificate on basic technical communication and user advocacy. Others would focus on more perishable, timely topics, like DITA.

As part of the process of choosing and designing these certificates, the SIGs should be involved.

6. Provide for more interactive sessions in a continuing effort to use optimal meeting formats. Part of this will involve the design and development of innovative formats, with a greater emphasis on discussions like Birds-of-a-Feather sessions at usability events and Idea Markets at the Forum conferences. STC should coach speakers and more rigorously track and act upon speaker evaluations.

7. Ensure that our overall educational programs best meet the needs of members by conducting a more comprehensive industry survey on an annual basis (not just the membership survey). Such tracking would provide us with more substantial data on which to make programming decisions.

8. Provide pricing incentives for the conference program that might attract more participants. Follow industry-standard practices for association events, such as discounts to “delegations” from outside North America (usually 10 or 15 participants from a particular country) or groups of 3 or more people from a given employer.

In addition, because some of our members are self-employed and extremely cost-constrained and because some companies do not support conference attendance, individually pricing certain elements of the conference could increase opportunities for people on tight budgets to attend parts of the event.

9. Because speakers provide the cutting-edge content and have the lion’s share of responsibility for serving as the public face of our event, our relationship with them is a vital one that needs to be nurtured. We should therefore make every effort to strengthen our relationship with speakers. The Task Force recommends that we do so as follows:

- The Conference Advisory Committee should revise the Speaker Commitment form to, first, state a strong commitment of STC to the success of speakers (such as providing clear advance marketing and the speaker's lounge) and a similarly strengthened commitment by speakers, including a code of conduct (such as no selling from the podium).
- Provide speakers with more timely evaluations. By using a crack-and-peel evaluation form, speakers can be provided with a copy of their evaluations immediately after a session, and the conference staff can reduce the amount of

time needed to scan or type comments and send them later to speakers.

- Provide a speaker's lounge, with refreshments and practice equipment. This would replace the room that is currently available for rehearsals with a more comprehensive speaker care package.

10. Because conference participants must feel that they are valued and that they are part of a worthwhile, professional event to remain committed to the Society, special care must be placed on conference amenities, such as hospitality and food. For example, the breakfasts that used to be offered were a popular amenity after their introduction in 1989; to save money, they were scaled back and, eventually, dropped. Although this helped contain costs, it also negatively affected perceptions among participants, and may have had a long-term impact on the conference. Controlling costs must be balanced with customer care so that conference participants continue to feel that they are attending a worthy event and that their participation is valued.

11. Marketing is essential to the success of the conference:

- To generate new audiences, the STC needs to actively market the conference outside of the organization. At present, STC does not actively market the conference in the magazines and websites of other organizations.
- To generate stronger awareness and interest among STC members, the organization needs to market the event internally. For example, to make members better aware of the cost of the STC Annual Conference in relation to other events, STC should track its cost against other events that STC members might attend and communicate this information.

12. Although the Fall Training Event last year did not meet expectations, the Society should continue to look at programming a fall event. We believe that a fall event could address specialized needs within the Society more effectively than would be possible at an inclusive event like the Annual Conference. In addition, a successful fall event could become a major new source of revenue for the Society.

Partly as a result of the extremely limited time available to prepare this recommendation and partly because we believe that the new Executive and Education Directors should have the opportunity to participate in designing this event, we would like to recommend the following:

- Our SIGs should be consulted in planning this event and given a formal role in that.
- The Conference Advisory Committee should prepare a proposal for delivery no later than January 2007.
- STC should strive to launch this event in the fall of 2007, though we might only be able to do so with invited speakers the first time.

- STC should investigate the feasibility of partnering with a CEU-granting organization or university to award CEUs for completion of designated training events.

13. To ensure that they are familiar with current industry trends in conferences, the Executive Director and Education Director and the top conference volunteers should be supported in attending other conferences that are relevant to our field. At the least, each should attend one other event.

Electronic Delivery Recommendation: Educate and Train STC Membership through Electronic Delivery of Content

To date, STC has not been very aggressive or innovative in terms of electronic delivery of educational content to our members or others in the profession. Aside from telephone seminars/Webinars and the online availability of articles from *Intercom* and the journal, the Society has largely ignored the methods that its members, their companies, and other professional organizations are using to deliver content to stakeholders.

Because only a fraction of the membership attends the annual conference and regional/chapter conferences, and because the Society is attempting to reach out to members of the profession outside North America, it is imperative that STC pursue other means of offering educational opportunities.

By truly leveraging the power of the Web and other emerging technologies, STC can address a worldwide audience and provide significant educational offerings to members and prospective members alike.

Specific Recommendations

1. The current Web site, which mostly provides information about the organization, should be transformed into an education delivery tool. This transformation will make <http://www.stc.org> a portal to various information sources about the field, both those produced by STC and those provided by others.

To achieve such transformation, we need to thoroughly evaluate the current site and collect and analyze requirements to support the educational activities listed here. A Web advisory committee consisting of representatives of the committees described below should work with the staff to conduct this evaluation, collect requirements, and guide the implementation of the new Web portal.

2. The new stc.org portal should point to and index STC information sources of all kinds—the magazine and journal, and other resources currently available on stc.org, and resources available on all the community sites.

The portal should allow users to search content across all STC sites easily, intuitively, and simultaneously, drilling down through a series of indexed links rather than exclusively searching on keywords.

The portal should indicate the quality level of the STC information to which it points. Although *Technical Communication* content is peer reviewed, *Intercom* articles and annual conference proceedings papers are not professionally vetted at present. A committee of senior people from industry and academe should be charged with devising a method of reviewing all STC society-level content and of implementing such a review. Geographical and virtual communities should be encouraged to implement similar reviewing bodies.

This existing content should continue to be provided free to members and be available for sale to nonmembers.

3. In addition to STC content currently available, we need to capture and serve other content. Podcasts of phone seminars/Webinars and big-name speakers at the annual conference would be a good beginning. This premium content would be available at a modest charge to members and be available for sale at a higher charge to nonmembers.

4. We should initiate a series of synchronous and asynchronous online certificate courses parallel to those that we are recommending be provided through the annual conference. In the short term, we need to ensure consistent quality and depth of content across these offerings; in the longer term, they should be branded consistently as STC products. This premium content would be available to members and nonmembers at costs less than those charged for the face-to-face classes at the conference.

5. The portal should also point to information about the field provided by other organizations, companies, and individuals. The EServer TC Library (<http://tc.eserver.org/>) is a model of the sort of comprehensive listing we have in mind. Geoff Sauer, who manages the portal, has indicated a willingness to partner with STC to help develop this capability.

6. We should begin to develop a body of knowledge (BoK) for technical communication that distills the essential knowledge in the field and provides that information online. Development of the BoK should be defined and guided by a committee of senior people in industry and academe. It might begin with a conceptual map developed through a symposium that is then fleshed out through a series of “state of the field” studies funded by research grants.

As the BoK evolves, the information developed should be made available on the portal. The Usability Professionals Association’s usability body of knowledge preview site (<http://www.usabilitybok.org/>) provides a glimpse of what we envision.

7. We should investigate partnering with O'Reilly or similar vendors of online books and with other publishers to make their back inventory available electronically at discounts to our members.
8. We should also consider partnering with software training vendors to provide online training at an attractive price on commonly used applications (Word, FrameMaker, DreamWeaver, PowerPoint, Excel, Acrobat, etc.).
9. We should develop a long-range plan for all of our publications (journal, magazine, Web site, *Tieline*, conference proceedings, and others that may evolve) that ensures a consistent level of professionalism and quality and that will help us more fully exploit the potential of existing and future publications, with regular assessments of their effectiveness and exploration of delivery options.

A publications advisory committee composed of members with recent and relevant publications experience should produce the plan and guide its implementation, working closely and cooperatively with the publication editors and the staff publications director.

10. We should investigate how to leverage Web-based media, such as podcasts, wikis, course delivery software, and e-conferencing tools, to support the goals described here.

We've already addressed several ways that podcasts might be used. The group charged with implementing the BoK could use wikis to develop the content and encourage participation by all those interested in building the BoK. The online certificate courses could benefit from a tool such as BlackBoard or WebCT. And both widely dispersed geographical communities and virtual communities could make significant use of e-conferencing in developing and delivering content.

11. To implement this plan, we need a clear, simple intellectual property policy that protects the interests of authors and the Society.

Most other professional organizations require authors of journal and magazine articles and conference proceedings papers to transfer copyright to the organization, with generous allowance for reuse by the authors. This policy protects the organization's volunteer and cash investment in peer-reviewing and publishing the content (STC easily spends \$500,000 annually on its publications), circulates the authors' ideas, and allows both the organization and the authors to reuse content.

Until recently, STC had a similar policy, but last fall decided to ask for only one-time print and online rights from authors.

STC should appoint an intellectual property policy committee to define a policy that allows the Society to repurpose content, that provides authors with a generous and reasonable right to reuse material, and that shares royalties in a way that recognizes both the Society's investment in publications and the authors' intellectual investment in their work.